



Filing ID #10024433

FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • 135 Cannon Building • Washington, DC 20515

FILER INFORMATION

Name: Jessica Morse
Status: Congressional Candidate
State/District: CA04

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2018
Filing Date: 08/13/2018
Period Covered: 01/01/2017– 08/13/2018

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Bank accounts [OT] DESCRIPTION: Checking and Savings accounts		\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
Fidelity Roth IRA ⇒ Fidelity ADV Freedom 2040-CL A [MF]		\$50,001 - \$100,000	Capital Gains, Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
Harmon Family Trust [OT] DESCRIPTION: Family trust -- Land	JT	\$15,001 - \$50,000	None		
Rental Condo - Washington DC [RP] LOCATION: Washington, DC, US		\$250,001 - \$500,000	Rent	\$15,001 - \$50,000	\$15,001 - \$50,000
Schwab Account ⇒ Alcoa Corporation (AA) [ST] DESCRIPTION: Sold in 2017		None	Capital Gains	None	\$201 - \$1,000
Schwab Account ⇒ American FD Income Fund [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Schwab Account ⇒ Apple Inc. (AAPL) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$201 - \$1,000
Schwab Account ⇒ Arconic Inc. (ARNC) [ST]		None	Capital Gains	None	\$1 - \$200
DESCRIPTION: Sold in 2017					
Schwab Account ⇒ AT&T Inc. (T) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	Not Applicable
Schwab Account ⇒ Banco Santander, S.A. Sponsored ADR (SAN) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab Account ⇒ Barclays Bank Del [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	Not Applicable
Schwab Account ⇒ Citigroup, Inc. (C) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab Account ⇒ Colony NorthStar, Inc. 8.25% Series B cumulative redeemable perpetual preferred stock (CLNS\$B) [ST]		None	Capital Gains	\$201 - \$1,000	\$201 - \$1,000
DESCRIPTION: Sold in 2018					
Schwab Account ⇒ Dodge & Cox INTL Stock [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab Account ⇒ Fidelity ADV New [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Schwab Account ⇒ Freeport McMoran [CS]		None	Interest	None	\$201 - \$1,000
DESCRIPTION: Sold in 2017					
Schwab Account ⇒ General Electric Company (GE) [ST]		None	Dividends	None	\$201 - \$1,000
DESCRIPTION: Sold in 2017					
Schwab Account ⇒ Goodhaven FD [MF]		None	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
DESCRIPTION: Sold in 2018					
Schwab Account ⇒ JP Morgan Strategic INCM [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Schwab Account ⇒ KB Home (KBH) [ST] DESCRIPTION: Sold in 2017		None	Capital Gains, Dividends	None	\$1,001 - \$2,500
Schwab Account ⇒ Microsoft Corporation (MSFT) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$2,501 - \$5,000
Schwab Account ⇒ PACCAR Inc. (PCAR) [ST] DESCRIPTION: Sold in 2017		None	Capital Gains	None	\$1 - \$200
Schwab Account ⇒ Rock Tenn Co Bond [CS] DESCRIPTION: Bond		\$1,001 - \$15,000	Interest	\$1 - \$200	Not Applicable
Schwab Account ⇒ Safeway Inc [CS] DESCRIPTION: Fixed income bond		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Schwab Account ⇒ Schwab Value Advantage Money Market [BA]		\$50,001 - \$100,000	Interest	\$1 - \$200	\$1 - \$200
Schwab Account ⇒ Thornberg INVT Income [MF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Schwab Account ⇒ Thornberg Strategic [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab Account ⇒ Umpqua Holdings Corporation (UMPQ) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab Account ⇒ US Treasury Note [GS]		\$15,001 - \$50,000	Interest	\$1 - \$200	Not Applicable
Schwab Account ⇒ Verizon Communications Inc. (VZ) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000

* Asset class details available at the bottom of this form. For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

SCHEDULE C: EARNED INCOME

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Servant Leader Citizen Consulting	National Security Consulting	\$1,000.00	N/A
COMMENTS: This is an ongoing consulting agreement from July 2018 - December 2018 to develop a strategy to protect the soft networks our military relies on in war zones.			
Duco Advisors	National Security Consulting	\$200.00	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	PNC Bank	11/2013	Mortgage on condominium	\$100,001 - \$250,000

SCHEDULE E: POSITIONS

Position	Name of Organization
National Security Consultant	Servant Leader Citizen Consulting
National Security Consultant	Duco Advisors
Global Advisory Council	Euphrates Institute
Political Partner	Truman National Security Project
Organizer	Colorado Democratic Party

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
July 2018	Jessica Morse and Servant Leader Citizen Consulting	Weekly consulting services on strategically protecting soft networks in war zones from July 2018 - December 2018.
March 2018	Duco Advisors and Jessica Morse	Brought on as National Security Expert with Duco Advisor to provide consulting services upon request.

SCHEDULE J: COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE

Source (Name and Address)	Brief Description of Duties
Servant Leader Citizen Consulting (San Clamente , CA, US)	Provide National Security Consulting Services for six months

SCHEDULE A ASSET CLASS DETAILS

- Fidelity Roth IRA
DESCRIPTION: Fidelity ROTH IRA
- Schwab Account
LOCATION: US
DESCRIPTION: Schwab investment account

EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

Trusts: Details regarding "Qualified Blind Trusts" approved by the Committee on Ethics and certain other "excepted trusts" need not be disclosed. Have you excluded from this report details of such a trust benefiting you, your spouse, or dependent child?

☐ Yes ☒ No

Exemption: Have you excluded from this report any other assets, "unearned" income, transactions, or liabilities of a spouse or dependent child because they meet all three tests for exemption?

☐ Yes ☒ No

CERTIFICATION AND SIGNATURE

☒ I CERTIFY that the statements I have made on the attached Financial Disclosure Report are true, complete, and correct to the best of my knowledge and belief.

Digitally Signed: Jessica Morse , 08/13/2018